

# Portal Instructions: Creating Your New Account

<https://gerberandersonmark.com> - NEW Gerber, Anderson & Mark, Ltd Website

## Let's Get Started:

There are two locations to access your new portal. One is on our website by clicking on the "My Portal" button on the top of the page. The second is through the email from us inviting you to the portal or your tax season Gather Request. **Note: only clients with a valid email on file with our office received this email.** If you have not received an email portal invite or tax season Gather Request and would like to, please email our office to provide your name and email address you would like us to register at [ff.office@gerberandersonmark.com](mailto:ff.office@gerberandersonmark.com)



## What is a Portal?

At Gerber, Anderson, Mark we believe that our clients' success is our success. That's why we go above and beyond to provide the highest quality accounting services that help our clients achieve their financial goals.

The client portal is a complimentary tool we provide for our clients. The portal is a secure, private online platform that allows our clients to share information and documents with our firm. It features document uploading, secure messaging, and a personalized dashboard. On this dashboard you can access the digital copies of your tax returns with a retention period for up to 7 years, access your gather request, and more.



## Client Portal

Click below to access your portal. Reminder that you will need to set up a portal before you can access it. See the 'Portal Help' link for more information about creating a portal. Your gather request link is not a portal.

Start Here  
or Here



## Portal Help Guides

Click the link below for help with accessing your client portal, creating a new portal account, recovering or resetting your Email ID, and more



## Complete Your 2024 Gather Request

Hello,

Thank you for choosing Swenson, Saurer, Gerber, Anderson & Co., Ltd. for your tax needs this season. We're excited to work with you! Welcome to our new online organizer experience. The online organizer is quick, easy to use, fillable, and provides a personalized list of documents to gather for this tax season. You will also be able to attach documents, add notes and ask questions along the way!

Below you will see two links for the following:

### Organizer:

The "Let's Get Started" blue button will give you a link directly to your organizer. Note: if you choose this option please save this email to access your organizer in the future. A PC or tablet is required to access the questionnaire & organizer sections. A mobile device will only allow you to sign the engagement letter and upload documents.

### Portal:

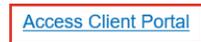
The "Access Client Portal" text link will help you to create your new portal experience AND give you access to your organizer. **We encourage you to set up a portal to better utilize the new helpful tools of your client portal.** A PC is required for this option.

**Helpful Tip\*:** While inputting and/or attaching documents within your fillable organizer section be sure to use the tabs on the **TOP & LEFT** side of your screen.

We are thrilled to offer this new and upgraded portal experience to our clients! Please do not hesitate to reach out if you have any questions.

Thanks,

Swenson, Saurer, Gerber, Anderson & Co., Ltd



This email is an auto-generated message. Please do not reply.

**Go through the steps on the next pages to create your New Portal Account**

## – Create New Account

### 1. Click **Sign Up**.

### Log in to your account

Please enter your details.

Email ID

[Forgot username?](#)

Continue

Don't have an account?

**Sign Up**

1



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### 2. Enter your **Name**.

### 3. Enter your **Email ID**.

### 4. Enter a **Mobile Phone Number** (optional).

### 5. Click **Verify your email**.

### Register your account

Let's get started!

Name

2

Email ID

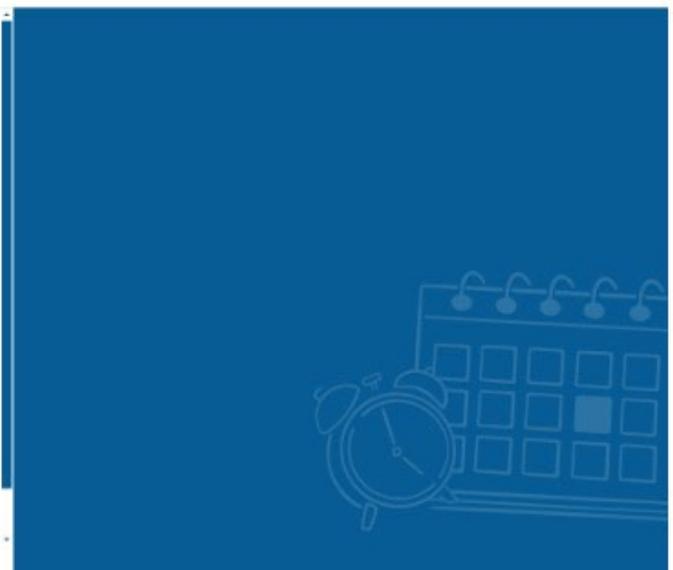
3

(your email address)

Phone Number ⓘ

Optional

4



6. Enter the **Access Code** sent to your email.

7. Click **Confirm**.

## Verify your identity

A One-Time Access Code has been sent to your email address; it **expires in 20 minutes**.

7 4 0 6 6 0 3 8 6

If you haven't received the code yet, please check your spam/junk folder.

[Resend Code](#)

Confirm

7

[Terms of service](#) | [Privacy Policy](#)



8. Type a 6 digit PIN into the **Create PIN** field (used for future logins).

9. Type the same 6-digit PIN into the **Confirm PIN** field.

10. Click **Create Account**.

## Create your PIN

Final step! Now that your email is verified, create a 6-digit PIN.

Create PIN

\*\*\*\*\* 8

Confirm PIN

\*\*\*\*\* 9

Create Account

10

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Once you have completed these 10 steps you have successfully created your portal account.  
**\*You can now log into your account.** You will need to verify your email and use your pin to login each time as shown in the steps below:

## – Sign In To An Existing Account

1. Enter your **Email ID.** (your email address)
2. Click **Continue.**

### Log in to your account

Please enter your details.

Email ID

anniesafesend@gmail.com

1

[Recover or reset your email ID](#)

Continue

2

Don't have an account? [Sign Up](#)

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3. Enter your **PIN** (only required when logging in from a new browser or device).
4. Click **Continue.**

### Enter your PIN

Oops! It seems we don't recognize this device.  
Please enter your PIN to continue.

PIN

•••••

3

[Forgot PIN?](#)

Continue

4

5. Enter the **Access Code** sent to your email.
6. Click **Confirm.**

### Verify your identity

A One-Time Access Code has been sent to your email address; it expires in 20 minutes.

3 2 0 5 3 4 8 1

5

If you haven't received the code yet, please check your spam/junk folder.

[Resend Code](#)

Confirm

6

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